



CREATING APPROVAL WORKFLOWS

Learning Fundamentals - System Administrator Training

Approval workflows determine who approves training that requires registration approval before it can be launched from a user's transcript and the order of those approvals. The default system approval workflow is as follows:

Approver > Cost Center Approver > Manager > Manager's Approver > Manager's Cost Center Approver > Manager's Manager, etc.

If your current system does not have an approver, then the approver is skipped, and it goes to the next person in the chain.

To create a custom **Approval Workflow Template** navigate to:

ADMIN > TOOLS > LEARNING > LEARNING PREFERENCES > DEFAULT APPROVAL WORKFLOW TEMPLATES

1

Select **Create New Approval Template**

The screenshot shows the 'Approval Templates' page with a search bar and a list of templates. The 'Create New Approval Template' button is highlighted.

Approval Template Name
ILT Training Approval Workflow
ILT Training Approval Workflow 2
New Hire Orientation
Sales Training Approval Workflow
System-Generated Template
Training Greater Than \$150.00

2

Give the template a **name**

The screenshot shows the 'Define Approval Template' form with the 'Approval Template Name' field set to 'Compliance Workflow'.

Approval Step Number	Approver(s)



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3

Select the **+** next to the Approval Step Number

Approval Template Name: Compliance Work

Approval Step Number: 1 +

Save Cancel

4

From the dropdown select an **Employee Relationship, Users** or **Organizational Units** to fit the Approver role

Approval Step Number: 1

Approver(s):

- Select Criteria
- Employee Relationships
- Division
- Position
- Grade
- Cost Center
- Location
- Group
- Self Registration Group
- Users

Save Cancel

5

Select the **+** again to create additional approval steps

Define Approval Template

Approval Template Name: Compliance Workflow

Approval Step Number: 1 +

Approver(s): Coach

Employee Relationships + Create

Save Cancel

6

Select **Save**

Approval Template Name: Compliance Workflow

Approval Step Number: 1 +

Approver(s): Coach

Select Criteria + Create New Gr

2 +

Adams, Ann

Users + Create New

Save Cancel

The newly created Approval Workflow Template can be set to a training using the Approval Workflows tab in the Course Catalog. On the General tab, set the Required Training Approvals to the desired number of approvals necessary.